STATE OF MONTANA
DEPARTMENT OF REVENUE
JOB PROFILE

Working Title
Senior Registration Technician

Job Code Title
Administrative Assistant VI

Pay Band
4a

Job Code Number
436114

Information Technology and Processing Division
Processing and Retention Operations Bureau
Mailroom and Records Management Unit

Fair Labor Standards Act
Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Information Technology and Processing Division serves as the operational foundation for the department's business units. Through secure, up-to-date computing and processing environments the division's Information and Technology Services Bureau (IT) and Processing and Retention Operations Bureau (PRO) contribute to the department's overall efficiency in document and payment processing while ensuring confidentiality, integrity, and availability of taxpayer data, whether in paper or electronic form. In providing these services, the division enables the department to meet its business objectives and facilitates its mission to serve the citizens of Montana. The division also includes the Administrative Team. The Processing and Retention Operations Bureau ensures secure handling and delivery of taxpayer information, payments, and data to the appropriate systems and staff. The bureau is organized into four units providing tax return and payment processing including Account Maintenance and Cashiering, Data Capture, E-Services, and Mailroom and Records Management. The Mailroom and Records Management Unit is responsible for the secure handling, delivery, and processing of department mail and taxpayer records.

Job Responsibilities
The Senior Registration Technician provides training and leadership to unit staff and resolves data processing problems. The incumbent coordinates taxpayer account functions to ensure accuracy, efficiency, and completeness based on the division's data processing and records management processes. This includes organizing work assignments; providing training, technical assistance, and troubleshooting to other staff; setting up new taxpayer files in a database; receiving and verifying information; entering data; sorting and routing documents; assisting with data quality control; and ensuring secure handling and delivery of taxpayer information. The incumbent provides administrative services to support data processing, records maintenance, mail services, and taxpayer registration functions. The position reports to the Mail and Records Unit Manager and leads other registration technicians within the work unit including permanent, seasonal, and temporary staff.

- **Taxpayer Registration Coordination 55%**
    1. Develops desktop instructions to ensure work unit procedures are followed by all staff. Researches problems and takes steps to resolve them.

2. Reviews registration processing software and procedures to communicate changes in procedures. Evaluates workflow processes, efficiencies, and problems to identify the most effective use of staff and material resources to meet work unit goals and project objectives. Presents recommendations for improving workflow and performance.
3. Provides training, technical assistance, and troubleshooting of registration processing services. Monitors ongoing processing to identify training and technical assistance needs.
4. Coordinates with other work units to promote cross-training, resource sharing, and collaboration on common objectives. This includes coordinating workflow, schedules, materials, and resources to maximize the efficiency and cost-effectiveness of operations and services.
5. Creates, coordinates, and tracks project work plans for special tax account and payment processing projects by assigning priorities, monitoring progress, and establishing target deadlines. Identifies efficiencies and impediments and recommends appropriate solutions.
6. Tests new or alternative processes such as tax form changes or system updates. Works with programmers to test new database formats and reports and put them in to use.
7. Identifies and eliminates duplicate taxpayer records. Ensures that required records are present and complete. Identifies and resolves errors, discrepancies, and omissions as necessary.
8. Verifies non-duplication of taxpayer accounts by cross-checking identifiers (names, social security numbers) with existing and source data. Reviews taxpayer information and database cross-matches to identify errors and discrepancies. Verifies correct information and updates master files accordingly. Contacts internal partners to resolve problems such as non-conforming tax reports or electronic submissions to complete processing. Identifies and corrects errors to provide quality assurance by verifying entries, visual examinations, and monitoring processes.
9. Coordinates taxpayer registration programs, processes, and projects to support ongoing operations and services. This includes recommending and coordinating operational plans and work flow, customer services, quality assurance, and data and records management.
10. Produces, proofs, and distributes system reports to ensure processing complies with audit requirements through automated data queries and compiling reports.

- **Taxpayer Registration and Document Processing 25%**
  1. Accurately maintains, updates, and adds taxpayer account information as submitted on paper documents or electronically filed tax returns via registration functions in the department's tax processing system for all tax types according to established guidelines.
  2. Based on established procedures, provides one-on-one training to staff by giving instructions on the procedures for handling registration and information requests, technical assistance, and troubleshooting on taxpayer registration information management processes. Monitors ongoing registration and processing to identify and respond to training and technical assistance needs.
  3. Performs detailed and specialized tax document validation, batching, and numbering for all account or tax types. Researches tax documentation. Provides direction to staff.
  4. Sorts tax returns for further processing. Maintains tracking logs and notes regarding each transaction.
  5. Performs records management to ensure easy access, efficiency, and completeness of records. This may include retrieving and routing files for requestors, updating file out-slips, organizing files by document retrieval numbers, sorting and routing information, searching for lost files or contents, and closing or purging files.
  6. Verifies file data to ensure accuracy and completeness. Identifies and resolves errors and omissions related to taxpayer names, identification numbers, and other tax file related data by verifying, correcting, and adding details to files.
  7. Provides training, technical assistance, and troubleshooting on taxpayer registration services, processes, regulations, and software programs. Monitors ongoing registration and processing to identify and respond to training and technical assistance needs.
  8. Coordinates and establishes database files to enter, maintain, and process new registrant information. Coordinates with development team to design, test, and implement new database formats, queries, and reports as requested.

9. Provides information to taxpayers of registration requirements, tax laws, and processes. Advises and educates taxpayers and practitioners on proper methods and requirements for registration, tax returns, and payment submissions.

- **Processing Support Services 15%**
  1. Assists with processing accounts receivable from taxpayers to ensure accuracy, efficiency, and completeness. This may include validating payments, providing special processing for selected payment types, and resolving basic errors and discrepancies.
  2. Assists with processing taxpayer account data to ensure accuracy, efficiency, and completeness. This includes establishing database files, receiving and verifying information, monitoring automated updates, generating reports, purging records as appropriate, and assisting with manual records management.
  3. Assists with processing taxpayer files to ensure easy access, efficiency, and completeness of records. This may include receiving and verifying information, sorting and routing information, searching for lost files or contents, retrieving files for requestors, and closing or purging files.
  4. Assists with mail receiving, collection, processing, and delivery services to ensure accurate, efficient, and cost-effective services. This may include processing incoming, outgoing, special processing, and bulk mail orders as well as recording and tracking processing data.
  5. Resolves a variety of general processing problems to assist co-workers. This may include verifying data, reviewing data for errors, and resolving and reconciling data; researching and identifying location of lost documents, payments, and refunds; and ensuring that customer account information is accurately maintained.
  6. Responds to requests from internal and external customers to provide courteous and timely responses. This involves receiving questions and information requests, responding to general inquiries, and referring specific and technical issues to appropriate staff.
  7. Trains and advises other staff on primary functional area to resolve general problems and promote cross-training.

- **Other Duties 5%**
  1. Performs other duties as assigned by supervisors.

Job Requirements
To perform successfully a senior registration technician the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Skills in multi-tasking; paying attention to details and accuracy; organizing multiple tasks within short and inflexible timelines; mathematics; providing timely and effective written, verbal, and interpersonal communication; customer service; conflict resolution; compiling and analyzing data from multiple sources; following written and oral directions and instructions; identifying and correcting data errors; and word processing, spreadsheet, and database applications are required. This position works with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

This position requires general knowledge of automated data processing systems, records management, office operations, and customer service standards. The incumbent must have the ability to develop a progressively responsible knowledge of department work units, functions, and operations.
- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is graduation from high school or GED and three years of job-related work experience.
  - Work experience should be made up of data processing.
  - Other combinations of education and experience will be evaluated on an individual basis.

Department Core Values
- Respect: As a representative of the people of Montana, proceeds with the highest level of respect for

the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.

- Integrity: Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- Productivity: Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- Teamwork: Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

Working Conditions

Must work under time constraints, be able to maintain numerous projects at one time, and determine priorities on a daily basis. At times, the incumbent will deal with angry or difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. This position requires considerable computer and keyboard use and being seated for extended periods of time. Due to peak processing seasons, incumbent may work in excess of 40 hours per week which may include evenings and weekends. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

Special requirements

- Background Examination: Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.

- Compliance with All Appropriate Montana Tax Laws: An employee's tax status must be current.

This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.

Division Administrator Review: The statements in this job profile are accurate and complete.
Signature: Margaret Kauska, Division Administrator   Date: August 2010

Human Resource Director Review: The Office of Human Resources has reviewed this job profile.
Signature: JeanAnn Scheuer, Human Resources Director   Date: August 2010

Employee: My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: _____   Date: _____

Name (print): _____